

Under 1 Roof

Community in action

Case review

Why a case review?

Case reviews can harness learning from situations where outcomes are mixed, entirely positive or where goals have been hard to achieve.

A case review process can help to harness learning from a particular situation and improve practice. A case review might also reveal options and activities which may still be helpful to the overall situation depending on timing. Case reviews can also engage practitioners from the participating agencies who were not directly involved, in reflection and learning for the future.

The reasons to trigger a case review might include:

- sustained difficulties in achieving the planned outcome (such as housing or support)
- continued complex and intersecting issues cause the tenancy to be at risk or to have ended despite everyone's efforts
- difficulties reaching agreement on the course of action or the desired outcome
- difficulties engaging all stakeholders needed to pursue an outcome
- an adverse event has occurred despite continued effort by multiple stakeholders
- a case study includes significant learning and/or outcomes worth explicit reflection, documentation and application to new situations.

Case review process

- Convene key stakeholders
- Identify a person to independently chair the meeting (someone who has not been involved in the person's care and who is an experienced practitioner and facilitator)
- Involve at least two other experienced practitioners/managers who are independent of the situation
- Nominate a scribe
- Generate a summary of the intervention
- Identify successes and where there were barriers to success
- Analyse factors which contributed to success
- Analyse factors which contributed to barriers
- Develop an alternative set of actions responding to the identified barriers
- Evaluate if any of those actions could still make a positive difference
- Allocate tasks and responsibilities and monitor implementation through case coordination
- Translate key learning into a report back to the case coordination group and the managers' meetings
- Identify any general implications for learning and development and establish learning opportunities such as training.

Creating a supportive environment

Case reviews should be supportive and nurturing of the workers and agencies involved. They are intended to engage minds and imaginations in understanding what happened, bringing collective knowledge into play and building the knowledge base that helps agencies and care coordination groups achieve collaborative and coordinated outcomes.